

## Swift Queue Online Appointments

Practices who sign up with SwiftQueue can receive online bookings from patients who register with a SwiftQueue account.

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## SwiftQueue Setup

Open [www.swiftqueue.com/socrates/](http://www.swiftqueue.com/socrates/) in your internet browser and click **Register Now** to sign up.

**Swiftqueue**  
CO-ORDINATED HEALTHCARE... EMPOWERED

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## Accept Online Bookings For Your GP Practice

Seamlessly integrated into your Socrates Practice Management Software, Swiftqueue enables patients to book appointments online. Reduce your overheads and streamline your processes while retaining full control of which appointments are available to book online.

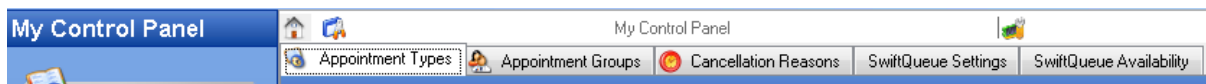
[Register Now](#)

Contact Swiftqueue (via their website) for any further details regarding practice registration, pricing etc.

Once you have registered Socrates Support will receive an email with a verification code and they will contact you to arrange a suitable time to install and configure Swiftqueue. Socrates Support will then configure Swiftqueue with you as per below.

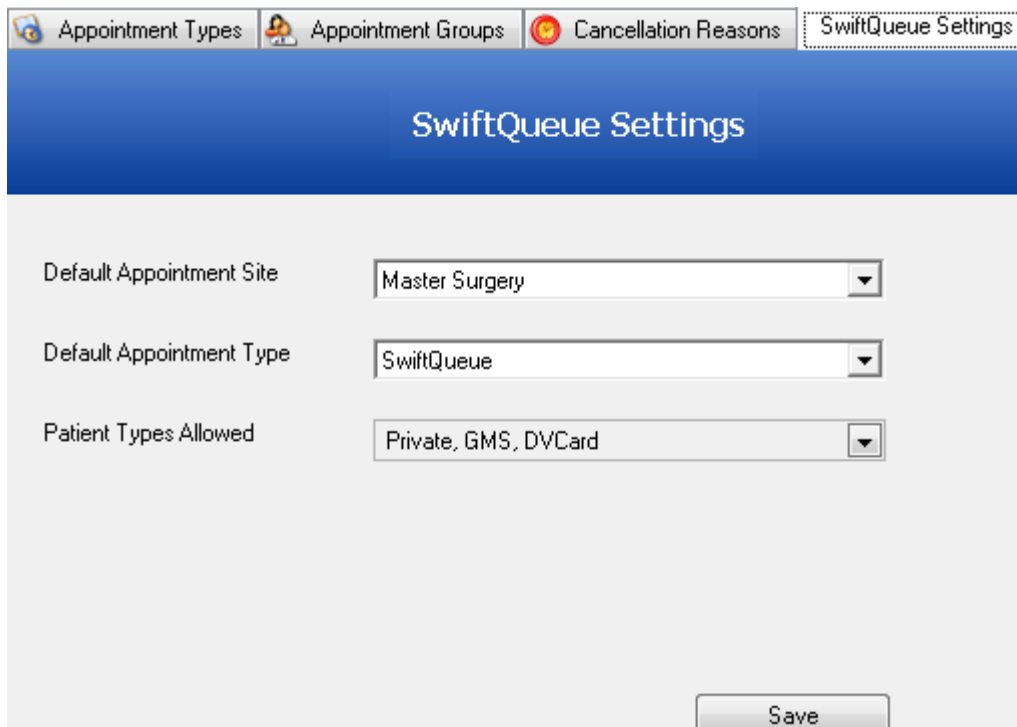
### Step 1: SwiftQueue Settings

When SwiftQueue is enabled there are 2 additional menu items in Socrates > My Control Panel > Admin Console > Appointments.



These settings allow you to customise your SwiftQueue appointments.

To accept the default settings click **Save**. Alternatively, select a new item from the dropdown list to change the default appointment site or appointment types. **This step is mandatory before you continue.**

A screenshot of the 'SwiftQueue Settings' configuration page. The page has a blue header with the title 'SwiftQueue Settings'. Below the header is a navigation bar with four items: 'Appointment Types', 'Appointment Groups', 'Cancellation Reasons', and 'SwiftQueue Settings' (which is highlighted with a dashed border). The main content area contains three settings, each with a label and a dropdown menu:

- 'Default Appointment Site' with a dropdown menu showing 'Master Surgery'.
- 'Default Appointment Type' with a dropdown menu showing 'SwiftQueue'.
- 'Patient Types Allowed' with a dropdown menu showing 'Private, GMS, DVCard'.

At the bottom right of the page is a 'Save' button.

If you want to customise your online appointments by patient type (Private, GMS, EHIC, etc), uncheck those that you want to automatically decline.

Type	Checked
Private	<input checked="" type="checkbox"/>
GMS	<input checked="" type="checkbox"/>
NHS	<input type="checkbox"/>
TempGMS	<input type="checkbox"/>
DVCard	<input checked="" type="checkbox"/>
TempDVCard	<input type="checkbox"/>
EHIC	<input type="checkbox"/>

Click **Save** to record the changes for the Practice.

### Step 2: SwiftQueue Availability

A list of all healthcare professionals with an active account in Socrates are displayed in the HCP dropdown list.

Any users who would like to allow patients to book an appointment online with them can check 'HCP Available on Portal' and select their availability on SwiftQueue.

Appointment Types Appointment Groups Cancellation Reasons SwiftQueue Settings SwiftQueue Availability

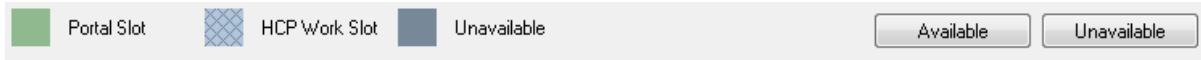
### SwiftQueue Availability

HCP: Emma Test

HCP Available On Portal Default Timeslot (minutes): 10

	Monday	Tuesday	Wednesday	Thursday	Friday
07:50	Available	Available	Available	Available	Available
08:00	Available	Available	Available	Available	Available
08:10	Available	Available	Available	Available	Available
08:20	Available	Available	Available	Available	Available
08:30	Available	Available	Available	Available	Available
08:40	Available	Available	Available	Available	Available
08:50	Available	Available	Available	Available	Available
09:00	Available	Available	Available	Available	Available
09:10	Available	Available	Available	Available	Available
09:20	Available	Available	Available	Available	Available
09:30	Available	Available	Available	Available	Available
09:40	Available	Available	Available	Available	Available
09:50	Available	Available	Available	Available	Available
10:00	Available	Available	Available	Available	Available

Use the mouse to select multiple HCP Work Slots and click **Available** to make these times available on the SwiftQueue website for patients to book an appointment.



Only those appointment slots which are **Green** (Portal Slot) will be available on the SwiftQueue website.

If a doctor wants to remove their availability from Swiftqueue or if they are leaving the practice, they should select all the available slots and click the Unavailable button. They can then uncheck 'HCP Available on Portal'. Then the doctor can be deactivated in the Socrates Server Manager.

## Online Appointment Bookings

### Appointments

When a patient registers on SwiftQueue, they can book an appointment for a HCP in the Practice at his/her designated time slot.

#### Patient Matching Process

1. Socrates checks if there is 1 active patient with the same first name, surname and date of birth; if it finds more than 1 then it checks the address line 1 for an exact match
2. If this fails Socrates checks if it can find one active patient with the same surname, date of birth and first initial of the first name.

Appointment bookings that are matched to a patient will appear on the diary using the appointment type allocated to them in Control Panel > SwiftQueue Settings assuming the following:

- Time slot requested for HCP is still available and HCP is active in Socrates
- Matched Patient is not blocked from the Portal
- Matched Patient is of Patient Type that is in valid list in SwiftQueue Settings

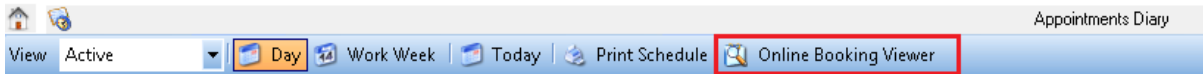
If it does not find one exact patient match or the above criteria are not met e.g. timeslot already taken, then it declines the appointment.

You can view all declined bookings in the **Online Booking Viewer** on the appointment diary.

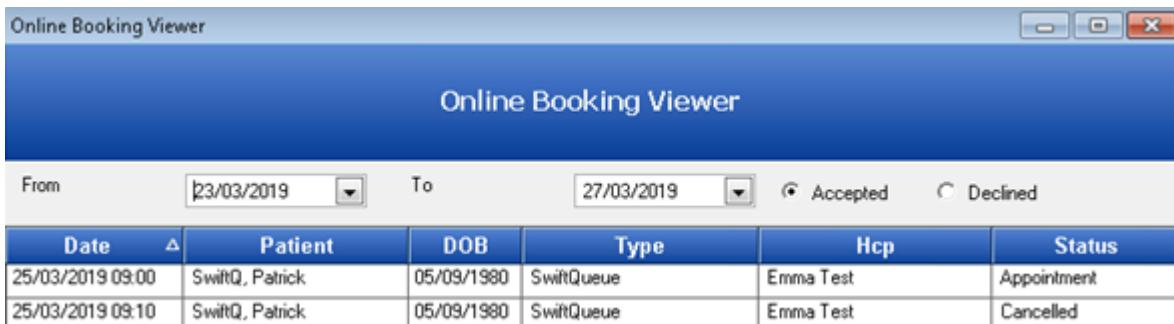
Patients should be contacted directly by the practice should their appointment be rescheduled in Socrates to another date or another HCP.

### Online Booking Viewer

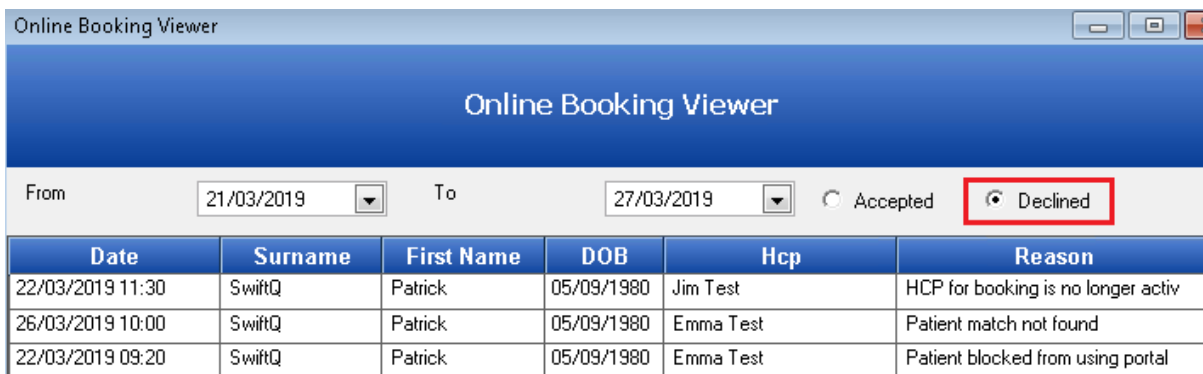
Click the Online Booking Viewer to view all SwiftQueue appointments.



The accepted bookings are displayed for today. Change the date filters to view previous SwiftQueue appointments.



Select the **Declined** radio button to view all appointment requests which have been declined.



You can use these details to identify if this is an existing patient which has not matched up to a patient in your database due to a difference in one or more of the following:

- Firstname
- Surname
- Date of Birth
- Address Line 1

When the patient contacts the surgery, you should ensure that the patient details registered on the SwiftQueue website match up with the details recorded in patient registration in Socrates in order for future appointments to match up automatically.

### Restrict Patient Appointments

Should you wish to restrict a particular patient from booking appointments on the SwiftQueue website you can check 'Portal Access Blocked' in Patient Registration > Extra Patient Details.

The screenshot shows the 'Patient Maintenance' interface. On the left is a navigation menu with options: Patient, Details, Extra Details, Family Details, Search Patient, Start Consultation, Email Patient, Print Lab Label, Add Hospital, Historical Data..., and Chart Access. The main area is titled 'Other Patient Details' and contains several dropdown menus: Nationality, Ethnic Origin, Religion, Residential Status, and Employment Types. At the bottom of this section, there is a checkbox labeled 'Portal Access Blocked', which is highlighted with a red rectangular box.

All patient appointments booked by this patient through the SwiftQueue website will be automatically declined.